

4

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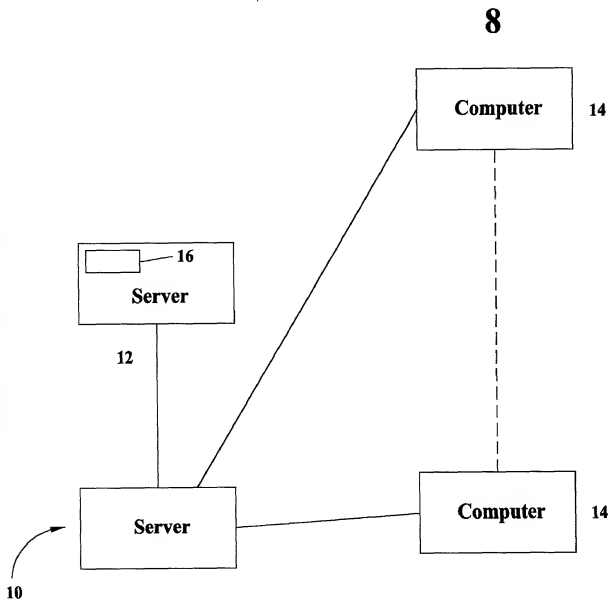


FIG. 1

Getting into the system

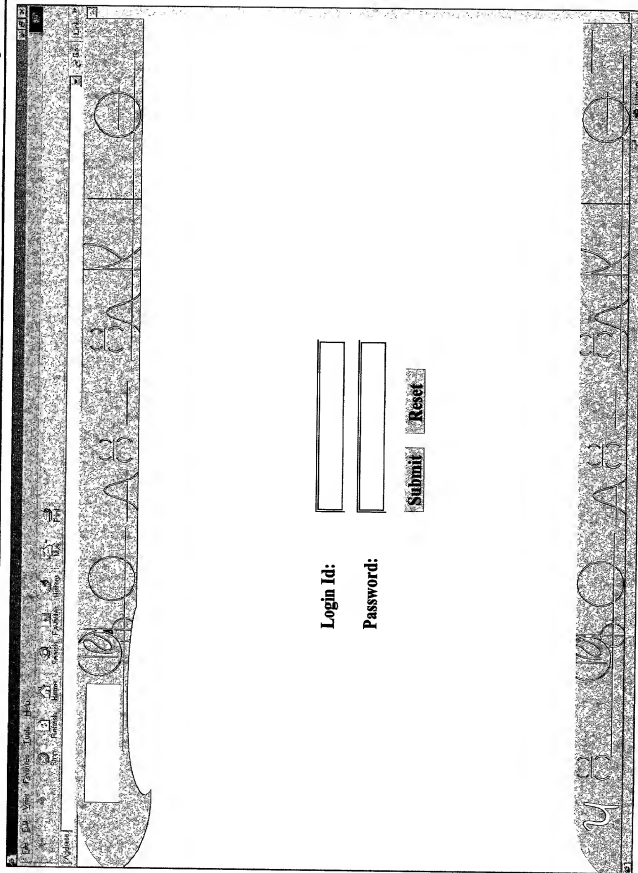


FIG. 3

Creating a Template - 1

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32

36

Applicant: LAVORONA et al
 Title: SYSTEMS AND METHODS FOR MANAGING BUSINESS METRICS
 Serial No.: 09/873,815
 Attorney: Dkt No.: 60709-00017
 Thomas M. Fisher, Armstrong Teasdale LLP, One Metropolitan Square, St. Louis, MO 63102 (314) 621-5070

File Edit View Profile Data Tools Help

Open Recent Print Save Undo Redo Find

Change Password Log Out

Template Definition

Template name:

Frequency: - Select -

First Due Date:

Field definitions

Contact name:

Contact phone:

Contact email:

File attachment:

Template description:

User Profiles

Templates

Create

Template Definitions

Validations

Select Box Details

Field Categories

Metric Targets

Modify

Copy Template Definition

Reporting Periods

Entities

50

1. Field Definition

User Profiles
Templates
Create
Template Definitions
Validations
Select Box Details
Field Categories
Metric Targets
Modify
Copy Template Definition
Reporting Periods
Upload Help File
View Attachments
Import Remote Database
Entities
Reports
Metrics Entry

Field Name:
Field Length:
Metric Type:
Field Label:
Label Style:
Mouse Text:
Calculation Formula:
Display metric after metrics entry:

Field Type:
Field Type:
Default Value:
Indent Level:
Short Label:
Help Text:
Roll Up Method:
N/A Option:

For field type CHAR: # characters
For field type NUMBER: # decimals

Change Password Log Out

Field	Guide	Example
Display Type	This field tells what will show up on the form in what order.	Text: will provide an input box Select box: makes a drop down Header Text: displays a comment on the form Text Area: creates a longer comment type box
Field Name	Individual name used for the field in the database	Quest1
Field Type	Describes what the input will be for the question posed	Char: Text input Number: Numerical input Date: Date input Calculated: Derived from other fields on the form.
Field Length	Only valid for text input. You can limit the length.	
Default Value	The value that will show up before there is an entry	
Metric Type	What is the class of Metrics	Number, Percentage, Reverse Percentage
Indent Level	Used for formatting. Each number is 4 characters.	
Field Label	What will display on the input form?	Enter number of days late:
Short Label	This is something that could be on a report	Days Late
Label Style	For formatting	Normal <i>Italic</i> , Bold
Help Text	This will display in the bottom white box, character space is limited to that size.	Enter the total number of complete days
Mouse Text	This allows for hundred of characters, Longer descriptions should go here	This is calculated as the day the actual delivery was made - the day that it was due.
Roll up Method	Not valid for all. If you are rolling it up, how will you do it?	Sum, Average, Max, Weighted Average
Calculation Formula	If the field is based on other fields in the form use this line to show that calculation	Field1*Field2
Category	If you want your metric grouped with another, click on your category that you have created.	Spandinetics
Display Metric	Yes or no. This is used to distinguish between actual tracked metrics and not	

[illegible]

Select Box Details



FIG. 8

Adding Metric Targets

Change Password | Log Out

Template name

Select Template

- SELECT TEMPLATE - ▼

Year of reporting period

- SELECT - ▼

Reporting period

- SELECT - ▼

User Profiles
 Templates
 Create
 Template Definitions
 Validations
 Select Box Details
 Field Categories
 Metric Targets
 Modify
 Copy Template Definition
 Reporting Periods
 Entities
 Reports
 Metrics Entry

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FIG. 9

Adding Metric Targets cont.

102201*518E2860

Change Password Log Out

Metric targets entry/modification

Template name : Monthly
Frequency : Monthly
Report Month : Jan 2000

Field order	Field Name	Weight	Green Level	Yellow Level	Red
1	users_supported	17	>	>=	=
2	number_of_calls	16565	=	>	between
4	speed_yield	10	=	>=	>=
5	speed_median	12	=	>	>
6	speed_span		Select	Select	Select
7	abandoned_rate	36456	>	>=	>=
8	resolved_on_first_c		Select	Select	Select
10	critical_yield	3	=	>	<

FIG. 10

	User Profiles	
	Templates	
	Create	
	Template Definitions	
	Validations	
	Select Box Details	
	Field Categories	
	Metric Targets	
	Modify	
	Copy Template Definition	
	Reporting Periods	
	Upload Help File	
	View Attachments	
	Entities	
	Reports	
	Metrics Entry	

	Change Password		Log Out
--	-----------------	--	---------

Create Field Category

Enter Category Details

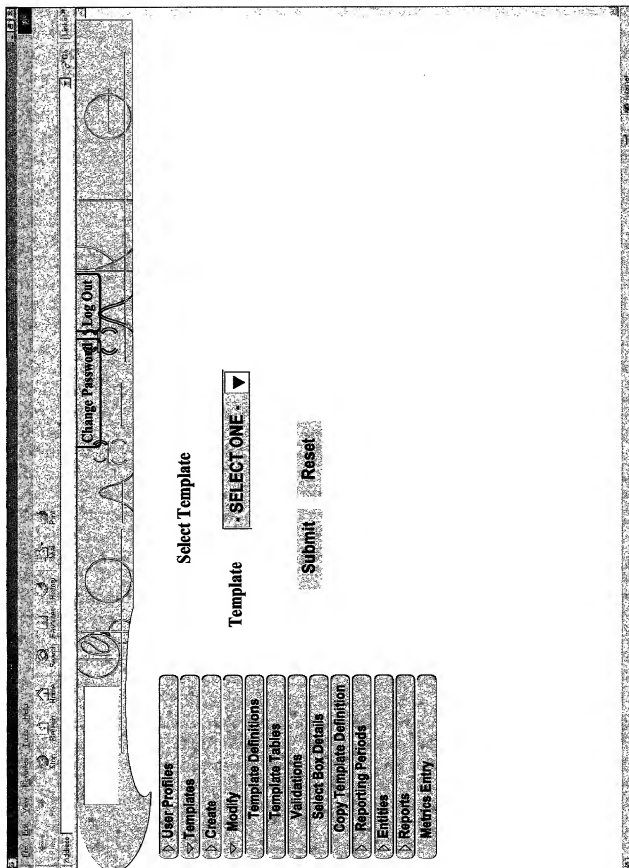
Template :

Category name : **Authentication**

Category Description : Fields that describe Authentication

Category Order : 3

Continue **Reset**



Modify Template Table

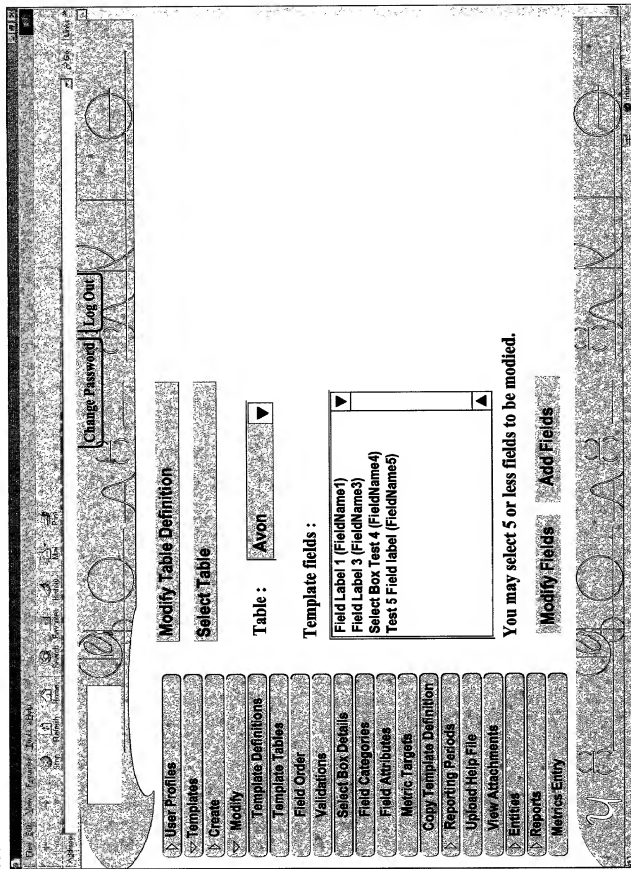


FIG. 13



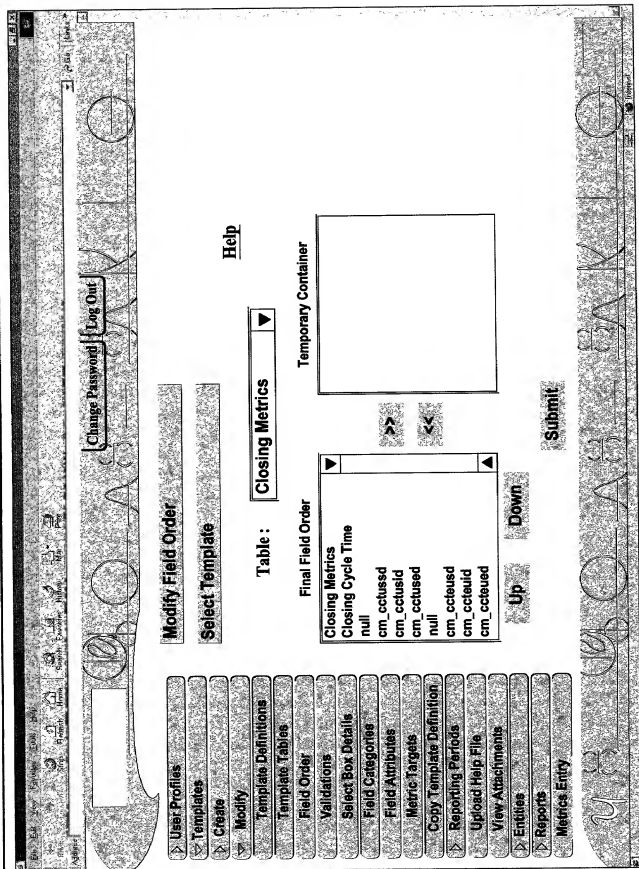


FIG. 16

Modify Select Box

Templates Modify Select Box

ITM SLMS
 datacurrency

Template :
 Fields :

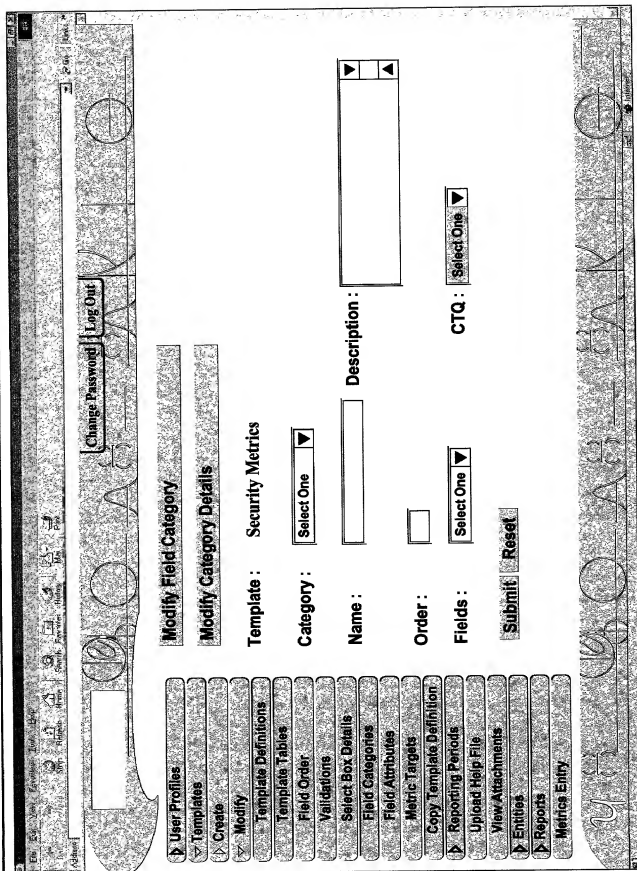
Note - Leave the text and value fields in blank to remove an option from the select box

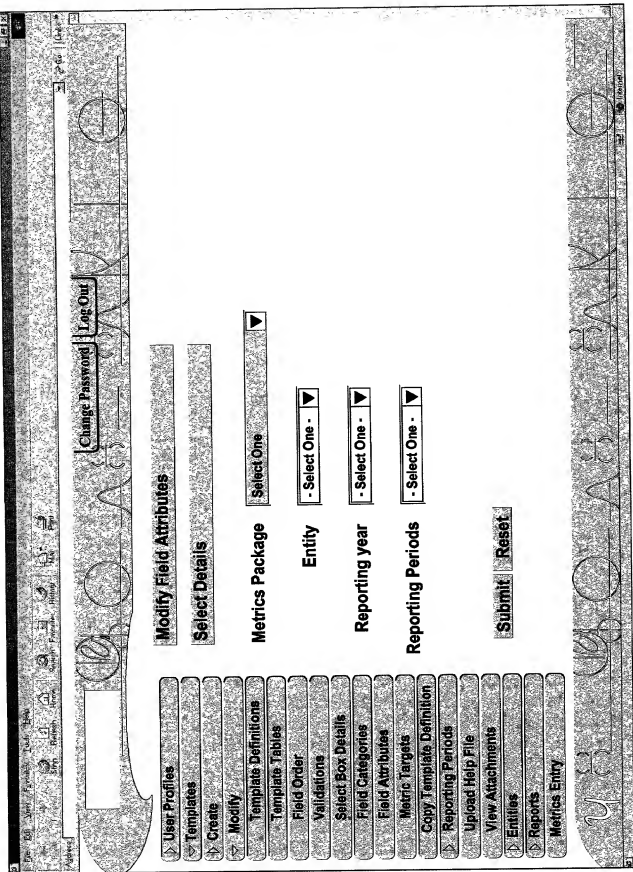
	Text	Value
1.	Less Than 3 Months	.75
2.	Between 3 and 6 Months	.5
3.	Between 6 and 9	.25
4.	Greater than 9 Months	0
5.	Current	1

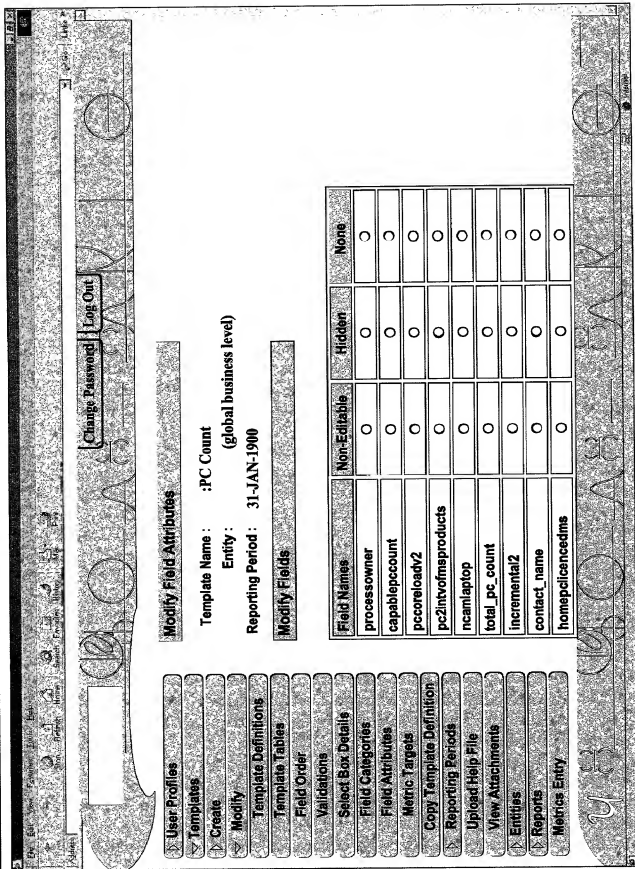
User Profiles
 Templates
 Create
 Modify
 Template Definitions
 Template Tables
 Field Order
 Validations
 Select Box Details
 Field Categories
 Field Attributes
 Metric Targets
 Copy Template Definition
 Reporting Periods
 Upload Help File
 View Attachments
 Entities
 Reports
 Metrics Entry

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Modify Field Categories







Copy Template Definition

FIG. 20

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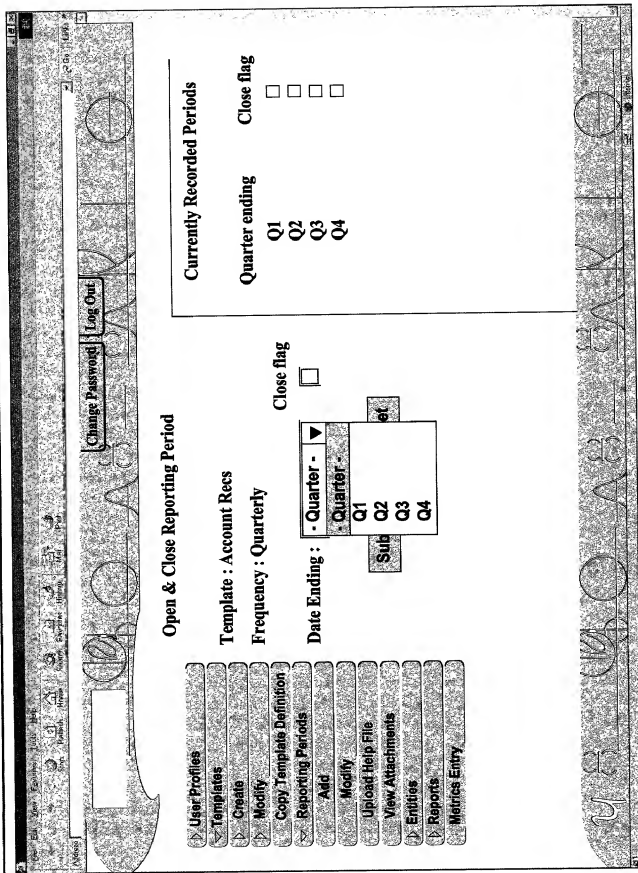
File Edit View Favorites Tools Help
 New Open Recent Print Preview Find
 Home Favorites History Back Forward Stop Reload
 Address:

Change Password Log Out

Copy Template Definition

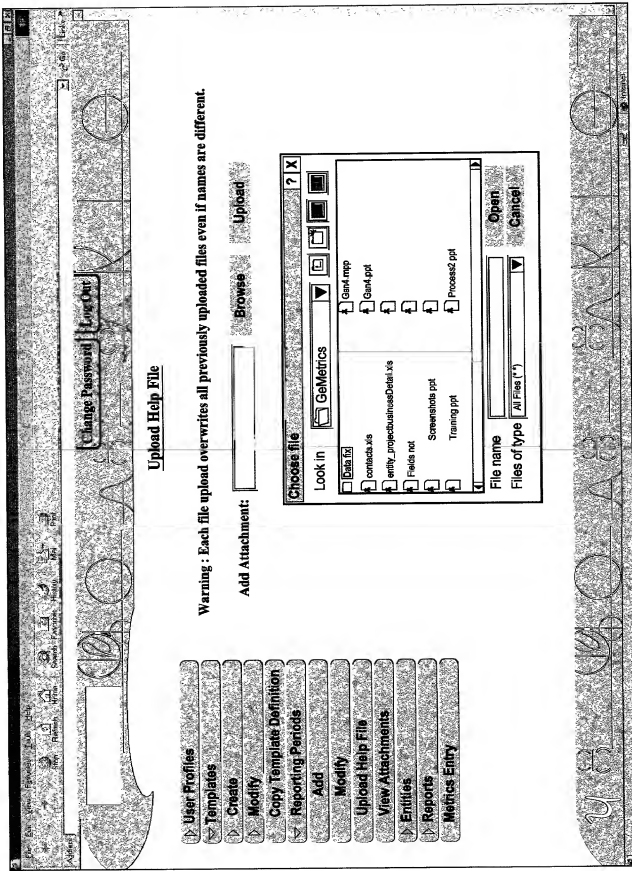
Template name :
 Frequency : - Select one - ▼
 Starting period :
 Copy from : - Select one - ▼

FIG. 21



Upload Help File

FIG. 22



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FIG. 23

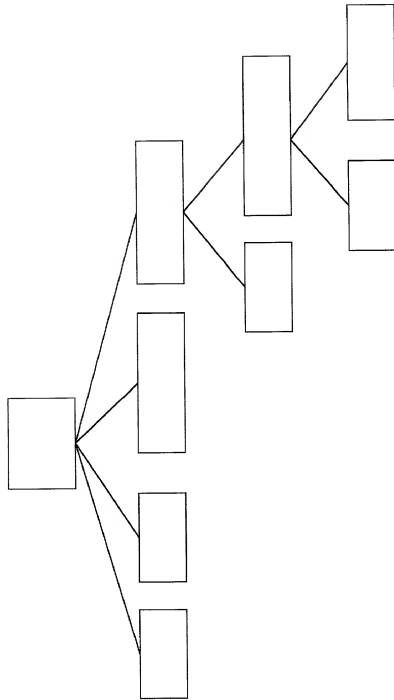
View Uploaded Files

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FIG. 24

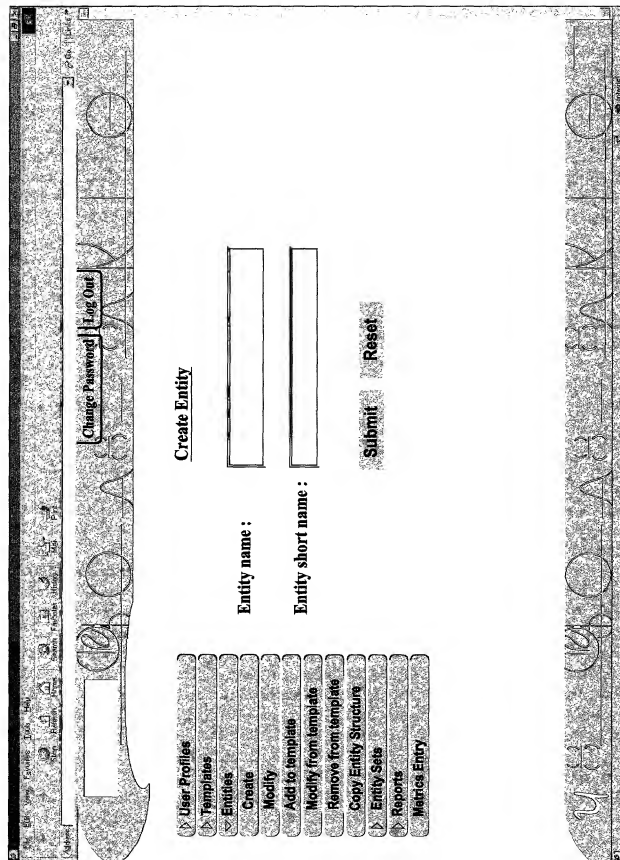
Adding Entities to your Template

Example:



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Creating new Entities



Adding Entities to the Template

<input type="text"/>	<input type="button" value="Change Password"/>	<input type="button" value="Log Out"/>
----------------------	--	--

Add to Template

Template :	<input type="text"/>
Entity name :	<input type="text"/>
Display Name :	<input type="text"/>
Parent entity :	- Select One - <input type="text"/>
Relative Weight For Rollups :	<input type="text"/>

FIG. 27

Modify from Template

102201-51862860

Address: City: State: Zip:

Log Out Change Password Log Out

Modify from template

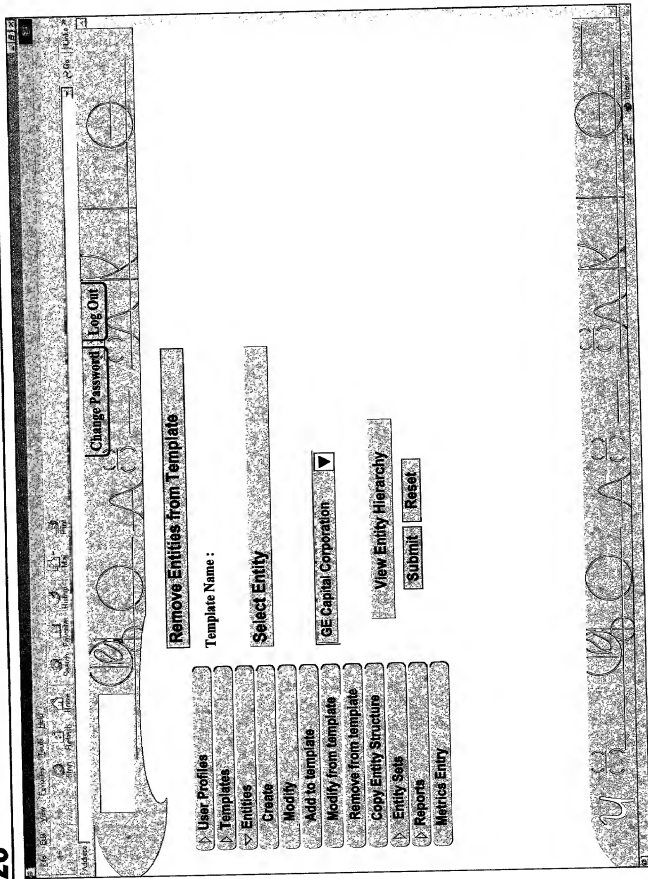
User Profiles
 Templates
 Entities
 Create
 Modify
 Add to template
 Modify from template
 Remove from template
 Copy Entity Structure
 Entity Sets
 Reports
 Metrics Entry

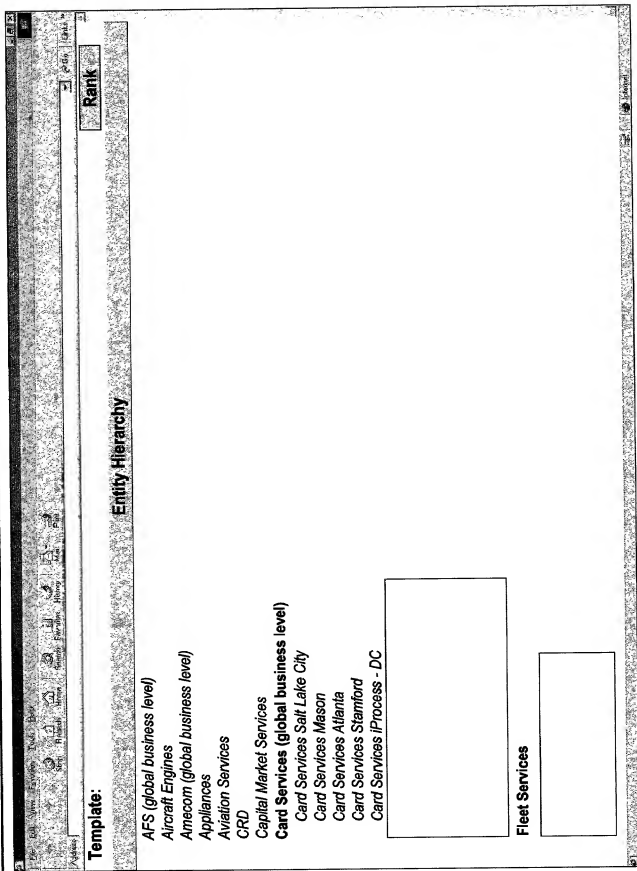
Template :
 Entity :
 Parent Entity :
 Display Name :
 Relative Weight
 For Rollups :

Submit Reset

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FIG. 28





File Edit View Options Help Tools Help
 New Open Recent Save Print Undo Redo Cut Copy Paste Find Help
 Address: [Redacted] [Change Password] [Log Out]

Copy Entity Structure

Copy Login IDs ☐

Note : Target template should not have any entities in it.

FIG. 31

Creating Users

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 Title: SYSTEMS AND METHODS FOR MANAGING BUSINESS METRICS
 Serial No.: 09/873,815
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FIG. 31

File Edit View Options Help User
 Home Favorites History Search
 Address:

Change Password Log Out

User Profiles
 Create User
 Modify User
 Grant access to templates
 Grant access to entities
 Reset Password
 Templates
 Entities
 Reports
 Metrics Entry

Login id:

First name:

Last name:

Telephone:

E-mail:

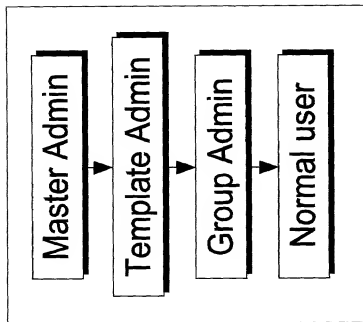
If it is the same as the login id, leave it in blank

User Type:

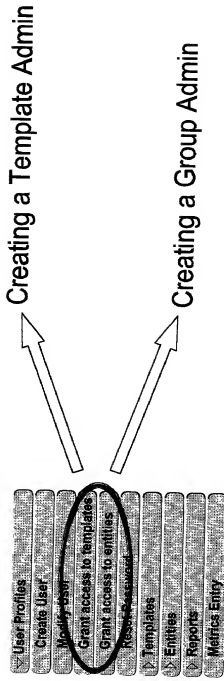
Notes:

FIG. 32

User Types



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Template Admin:

- Select the Template for which you want to grant Access
- Select the user ID for which you want to grant Access
- Select the level of access they should have
- Submit

Group Admin:

- Select the Template that contains the group for which you want to grant Access
- Select the user ID for which you want to grant Access
- Select the Group that they represent
- Submit
- Select view only or modify privileges

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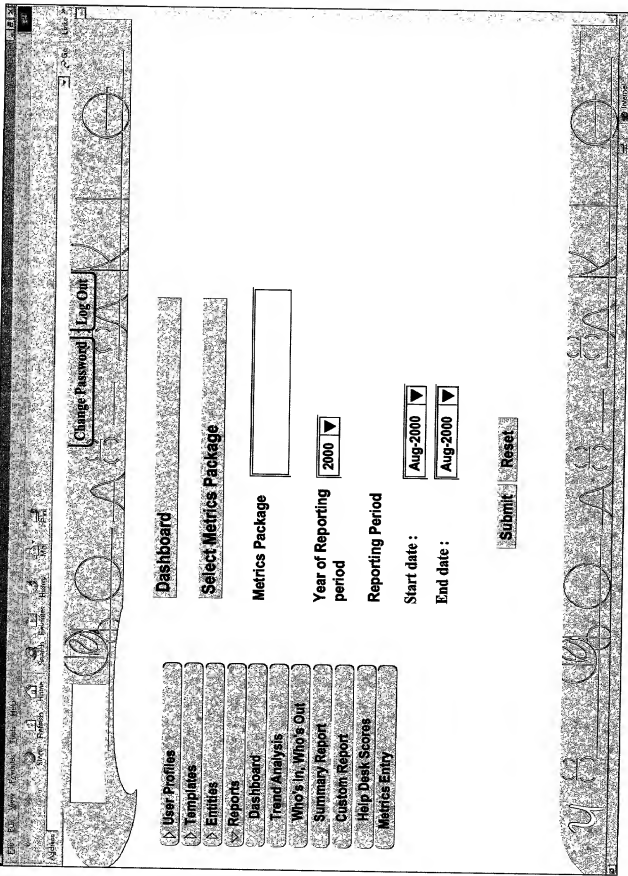
Change Password Log Out

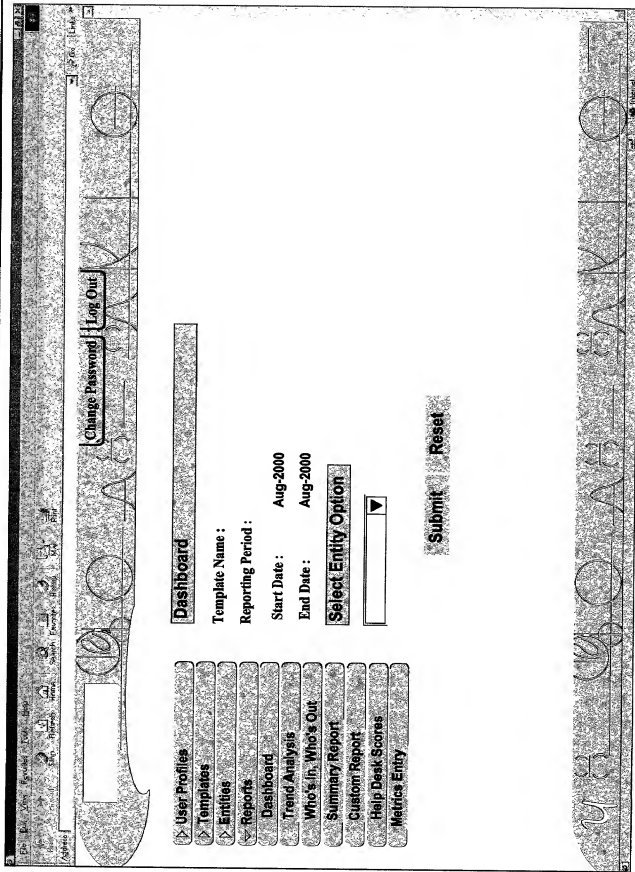
User Profiles
 Create User
 Modify User
 Grant access to templates
 Grant access to entities
 Reset Password
 Templates
 Entities
 Passwords
Metrics Entry

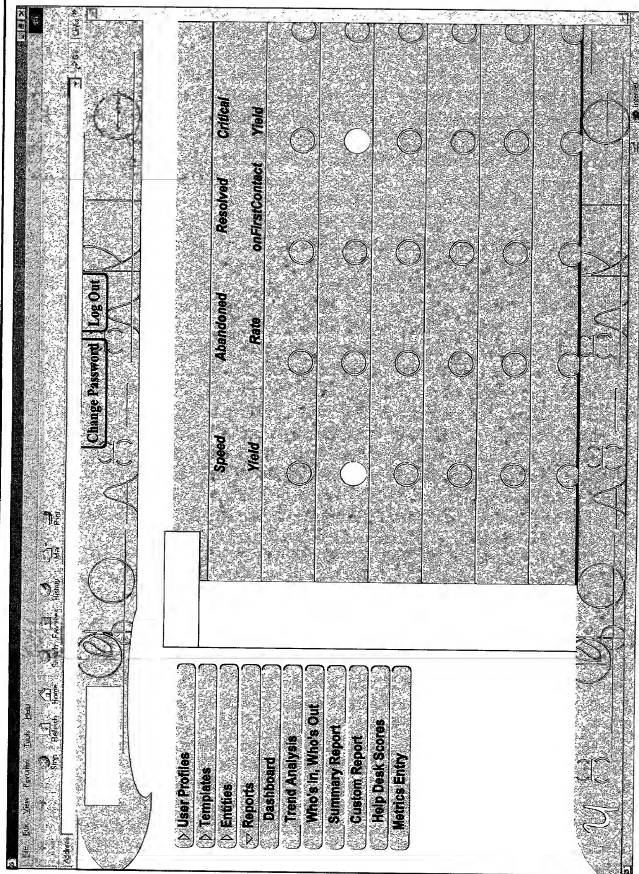
Select Metrics Package

Metrics Package - Select One -
 Reporting Entity - Select One -
 Entry for Date Ending - Select One -

Submit Reset







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10/20/2001 1:51:02 PM

Home | Search | Reports | Metrics | Trend Analysis | Log Out

Change Password

Trend Analysis

Select Metrics Package

Metrics Package

Reporting Year: 2000

Reporting Period

Start Date: SEP-2000

End Date: DEC-2000

Submit Reset

☐ User Profiles
☐ Templates
☐ Entities
☐ Reports
☐ Dashboard
☐ Trend Analysis
☐ Who's In, Who's Out
☐ Summary Report
☐ Custom Report
☐ Help Desk Scores
☐ Metrics Entry

Trend Analysis

Template Name :
 Reporting Period :
 Start Date :
 End Date :

Select Entities
 Select Measures

Abandoned Rate

Top 25 Businesses

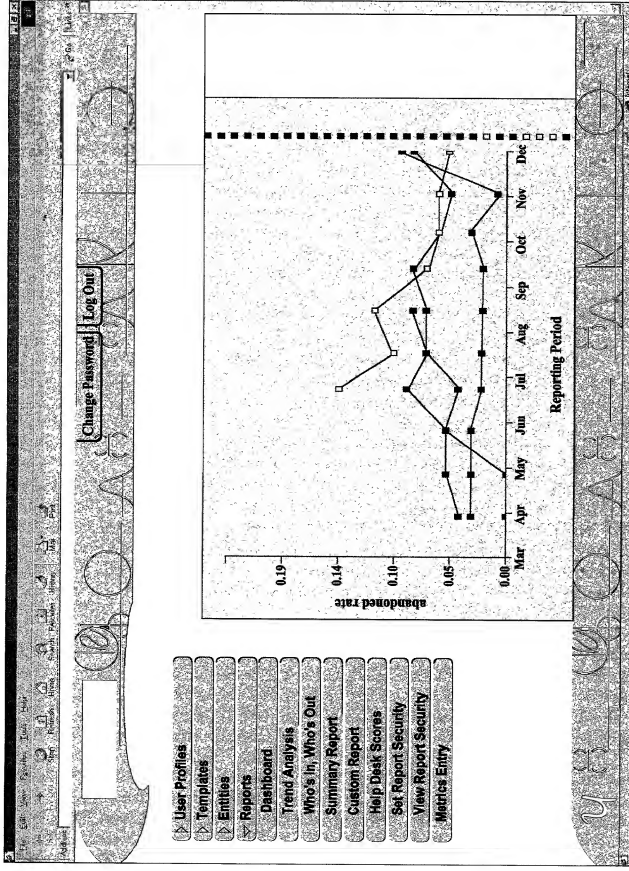


FIG. 41

FIG. 41

Who's in Who's out?

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 Attorney: Dkt. No.: 60709-00017
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File Edit View Window Help
 Home Insert Format Tools Window Help
 Address: Search: Open: Save: Print:
 Back: Forward: Home: Stop: Reload:
 Change Password Log Out

Who's in, Who's Out

Select Metrics Package

Metrics Package

Reporting Year

Reporting Period

Submit Reset

User Profiles
 Templates
 Entities
 Reports
 Dashboard
 Trend Analysis
 Who's in, Who's Out
 Summary Report
 Custom Report
 Help Desk Scores
 Metrics Entry

U.S. O-AB-BACK

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Who's In, Who's Out

Change Password | Log Out

Metrics Submission Status

Template
Reporting Period : Oct-2000

User Profiles
 Templates
 Entities
 Reports
 Dashboard
 Trend Analysis
 Who's In, Who's Out
 Summary Report
 Custom Report
 Help Desk Scores
 Self Report Security
 View Report Security
 Metrics Entry

Entity	Status
AFS (global business level)	Submitted on 09/nov/2000
Aircraft Engines	Submitted on 09/nov/2000
Americom (global business level)	Submitted on 09/nov/2000
Appliances	Submitted on 10/nov/2000
Aviation Services	Submitted on 07/nov/2000
CRD	Submitted on 09/nov/2000
Capital Market Services	Submitted on 09/nov/2000
Card Services (global business level)	None submitted
Card Services Salt Lake City	Not yet submitted
Card Services Mason	Not yet submitted
Card Services Atlanta	Not yet submitted

Print

User Profiles
 Templates
 Entities
 Reports
 Dashboard
 Trend Analysis
 Who's In, Who's Out
 Summary Report
 Custom Report
 Help Desk Scores
 Metrics Entry

Template Category
 Metrics

Metrics Summary Report

: Authentication Security Review Risk Management No Category

Year: 2000 Reporting Period: Q4-2000 SUBMIT

Business		Sys Access by 3rd Parties			Unprotected Connections	Approved Analog
Corporate		87.02	74.7		94.64	
		100	5		100	
		100	100		100	
		175	50		100	
		100	100		100	
	Plastics	100	100		100	
		100	99.99		0	
		100			100	
		100	91.3		96.9	
		100	100			

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File Edit View Options Help
 New Open Recent Print Preview Find
 Home Insert Format Tools Window Help
 Address: [Redacted] URL: [Redacted] [Go] [Stop] [Refresh] [Home] [Back] [Forward] [Print] [Find]

Change Password Log Out

Custom Report

Template :
 Reporting Period : Oct-2000

Select Fields

Select Entities

abandoned_rate (AR)
 attachment1 (attachment1)
 critical_incidents (CI)
 critical_median (CMED)
 critical_span (CSPAN)
 critical_yield (CY)
 normal_incidents (normal_incidents)
 normal_median (NMED)
 normal_span (NSPAN)
 normal_yield (NY)

Top 25 Businesses

Submit

User Profiles
 Templates
 Entities
 Reports
 Dashboard
 Trend Analysis
 Who's In, Who's Out
 Summary Report
 Custom Report
 Help Desk Scores
 Set Report Security
 View Report Security
 Metrics Entry

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File Edit View Options Help
 New Open Recent Print Setup...
 Address: 1234 Main St, St. Louis, MO 63102
 Phone: (314) 555-1234
 Fax: (314) 555-5678
 E-mail: info@company.com
 Website: www.company.com

Change Password Log Out

Metrics Listing

Template PC Count
 Reporting Period : Q4

Entity	Total PC Count	%Coreloadv2	%NCAM	#IncQualPCs
:USA				
:North America				
Corporate Systems.				
Corporate Systems.				
Corporate Systems.				
Corporate Systems.				
Corporate Systems.				

User Profiles
 Templates
 Entities
 Reports
 Dashboard
 Trend Analysis
 Who's In, Who's Out
 Summary Report
 Custom Report
 Help Desk Scores
 Metrics Entry

102201*5162600

Help Desk Scores

Change Password Log Out

Help Desk Scores

Select Metrics Package

Metrics Package

Reporting Year

Reporting Period

Start Date :

End Date :

Submit Reset

User Profiles

Templates

Entities

Reports

Dashboard

Trend Analysis

Who's In, Who's Out

Summary Report

Custom Report

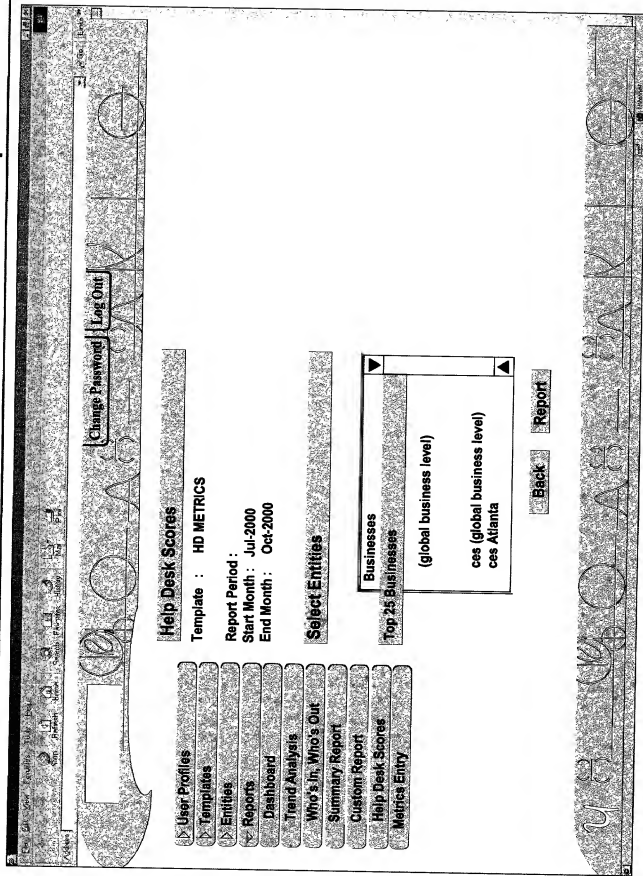
Help Desk Scores

Metrics Entry

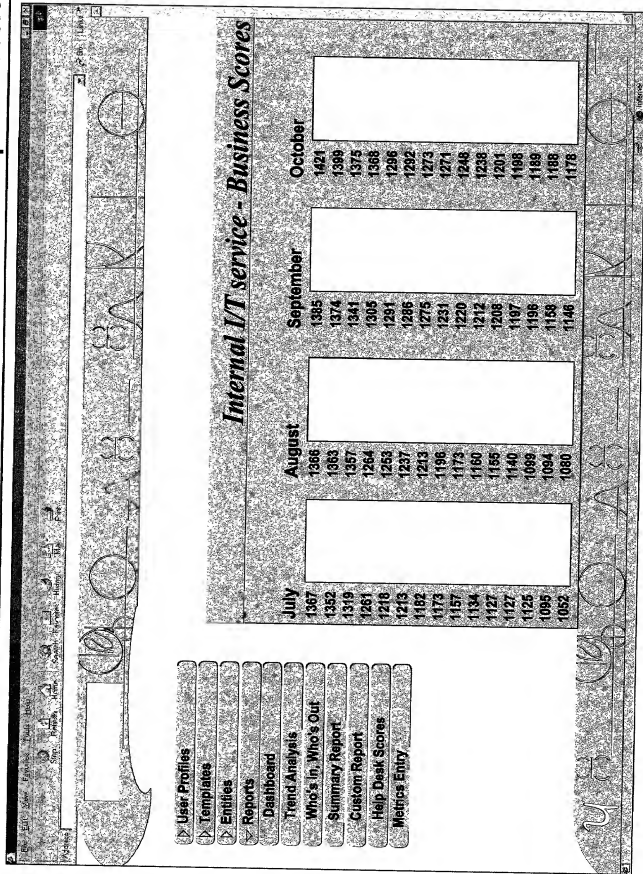
2000

Jul-2000

Oct-2000



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File Edit View Favorites Settings Help
 Home Back Forward Stop Reload
 Address: http://www.example.com/

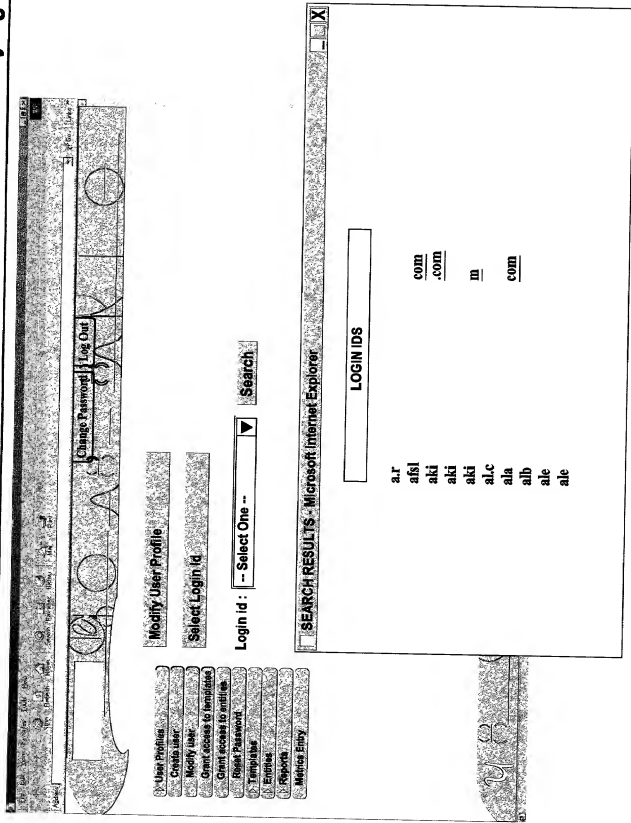
Change Password Log Out

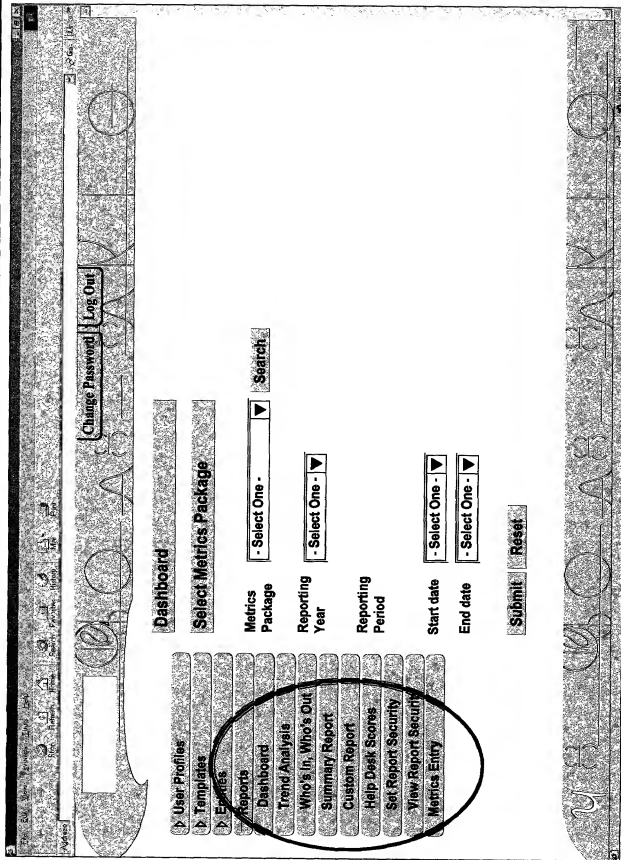
Detail Report

Template : HD METRICS
 Entity Name
 Reporting Period

User Profiles
 Templates
 Entities
 Reports
 Dashboard
 Trend Analysis
 Who's In, Who's Out
 Summary Report
 Custom Report
 Help Desk Scores
 Set Report Security
 View Report Security
 Metrics Entry

Field	Value	Green Level	Yellow Level	Red Level
Users Supported				
Number of Calls				
Speed Yield				
Speed Median				
Speed Span				
Abandoned Rate				
Resolved on First Contact				
Critical Yield				
Number of Incidents				
Critical Span				
Urgent Yield				
Number of Incidents				
Urgent Median				



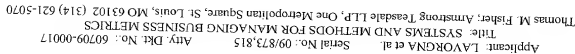


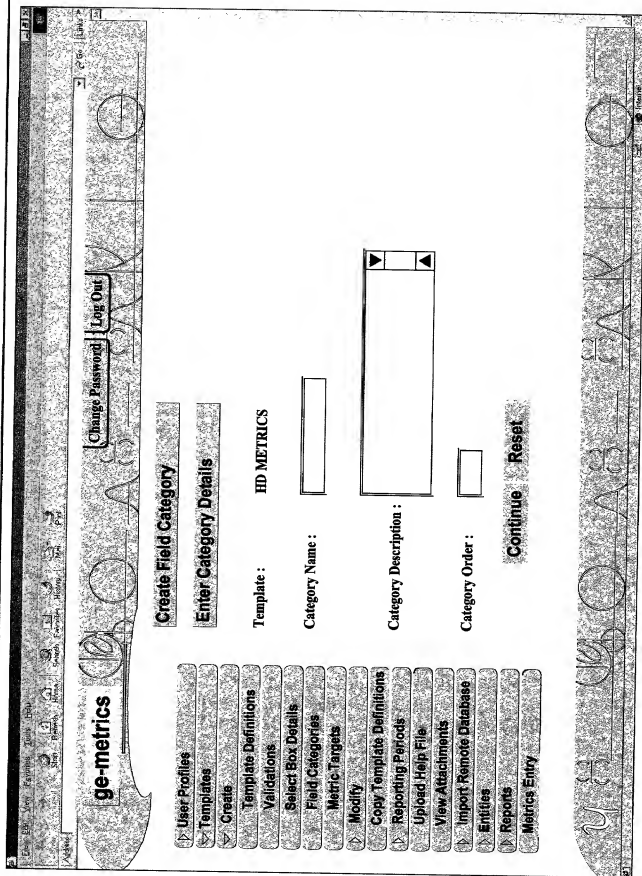
ge-metrics

Template name :
 Frequency : - Select -
 First Due Date :
 Contact name :
 Contact phone :
 Contact email :
 Template description :

Field Definition
 1.

Display Type : - Select One -
 Field Type : - Select One -
 Field Name :
 Field Length :
 For field type CHAR: # characters
 For field type NUMBER: # decimals
 Metric Type : - Select One -
 Default Value :





ge-metrics

Change Password Log Out

Create/Modify Metric Targets

Template name : Monthly
Frequency : Monthly
Report Month : Jan 2000

Field order	Field Name	Weight	Green Level	Yellow Level	Red Level
1	users_supported		Select	Select	Select
2	number_of_calls		Select	Select	Select
4	speed_yield	>=	.98	between .94-.97	< .94
5	speed_median	Select	Select	Select	Select
6	speed_span	Select	Select	Select	Select
7	abandoned_rate	<=	0.4	between .04-.06	>= .06
8	resolved_on_first_c	>=	.6	between 4-.6	< .4
10	critical_yield	>=	.98	between .94-.98	< .94

User Profiles

Templates

Create

Template Definitions

Validations

Select Box Details

Field Categories

Metric Targets

Modify

Copy Template Definitions

Reporting Periods

Upload Help File

View Attachments

Import Remote Database

Entities

Reports

Metric Entry

FIG. 58

102201 51024860

ge-metrics

Change Password Log Out

Entity name : GE Capital Corporation

Entity short name : GECC

Submit Reset

Use Profiles

Templates

Entities

Create

Modify

Add to template

Modify from template

Remove from template

Copy Entity Structure

Entity Sps

Reports

Metrics Entry

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FIG. 59

ge-metrics

Change Password Log Out

Add Entities to Template

Template : HD METRICS

Entity name :

Display name :

Parent entity :

Relative Weight
For Rollups :

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FIG. 60

102201-51222660

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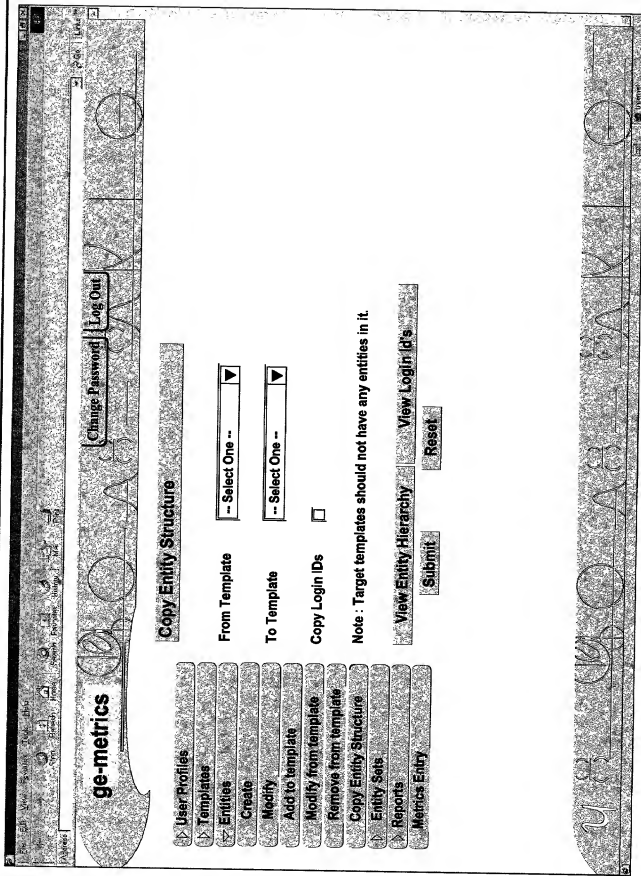
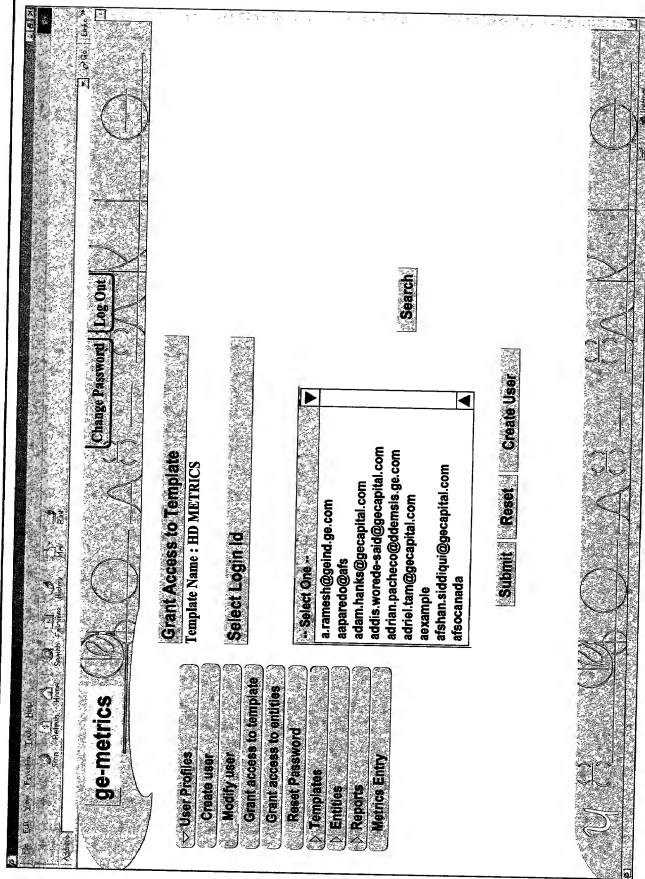


FIG. 62

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102201 51627860



FIG. 64

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ge-metrics

Home About Contact Help Log Out Change Password

Metrics Entry

Select Template

Metrics Package

Reporting Entity

Reporting Period

Submit Reset

User Profiles

Create User

Modify User

Grant access to template

Grant access to entities

Reset Password

Templates

Entities

Reports

Metrics Entry

HD METRICS

Aircraft Engines

Apr-2001

FIG. 64

FIG. 65

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ge-metrics

Change Password

Log Out

User Profiles

Create user

Modify user

Grant access to template

Grant access to entities

Reset Password

Templates

Entities

Reports

Metrics Entry

Metrics Entity

User ID : admin

Entity : Aircraft Engines

Template : HD METRICS

Reporting Period : Apr-2001

Contact Information for this Template :

Name : David Lee

Phone : 228-2206

Email : david_lee@gecapital.com

Warning : Session will expire in 1 hour. You may save partial input and can comeback later.

Note : Please enter all percentages in decimals between 0 and 1, e.g. for 98% enter 0.98

Users Supported	<input type="text"/>	<input type="text"/>
Number of Calls	<input type="text"/>	<input type="text"/>
Speed to Answer		
Speed Yield	<input type="text"/>	<input type="text"/>
Speed Median	<input type="text"/>	<input type="text"/>

FIG. 66

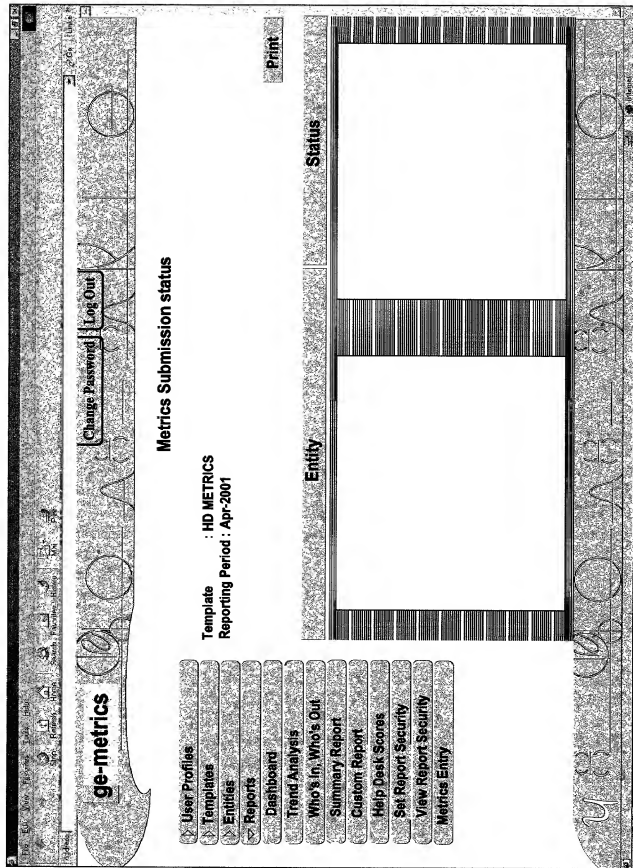


FIG. 67

DASHBOARD METRICS - Microsoft Internet Explorer									
March 2001									
GE Capital									
Speed		Abandoned		Resolved		Critical		Urgent	
Yield		Rate		on First Contact		Yield		Yield	
Business Entity	94.00%	0.13%	69.43%	100.00%	100.00%	100.00%	100.00%	100.00%	95.53%
Business Entity	97.00%	1.00%	92.00%	88.00%	100.00%	100.00%	100.00%	100.00%	97.00%
Business Entity	93.30%	0.30%	80.70%	100.00%	100.00%	100.00%	100.00%	100.00%	96.70%
Business Entity	100.00%	0.65%	70.09%	100.00%	100.00%	100.00%	100.00%	100.00%	96.67%
Business Entity	93.85%	0.00%	69.30%	96.59%	97.65%	98.44%			
Business Entity	93.60%	1.00%	69.20%	99.50%	96.00%	92.00%			
Business Entity	87.50%	2.10%	79.20%	100.00%	84.30%	95.60%			
Business Entity	99.00%	0.60%	64.00%	98.70%	99.00%	93.00%			
Business Entity	93.00%	0.46%	64.37%	100.00%	94.44%	97.53%			
Business Entity	81.00%	6.00%	61.00%	100.00%	95.00%	87.00%			

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